**CHAPTER 5**

**OFFICER RECRUITING PRODUCTION AND MANAGEMENT SYSTEM (ORPMS)**

**SECTION 1**

**GENERAL**

**050101.  BACKGROUND.**  The Officer Recruiter Production and Management System (ORPMS) is designed to manage all available resources within the Navy Recruiting District (NRD) to achieve goal.  The Recruiting Operations Officer (R-OPS)/Officer Assistant Chief Recruiter (OACR) shall train and direct each Navy Recruiting Station (NRS) Commander/Officer Recruiter (OR) in system use and monitor recruiter production weekly during the Officer Production Review (OPR).  The Officer Production Analysis for Training and Evaluation (OPATE) worksheet, applicant log and recruiter planners, when used in conjunction with other available systems, can effectively increase production and improve the recruiter's quality of life.  These systems can be located on the NRC Quarterdeck at https://www.cnrc.navy.mil.  When used properly, the ORPMS system is the most effective method of increasing production and ensuring ORs have the tools necessary for mission success.

**050102.  PURPOSE.**  ORPMS provides production personnel with the tools necessary to effectively evaluate recruiting activities and achieve goal.  The worksheet, planner, and logs shall be used by the R-OPS/OACR/NRS Commanders and ORs to plan and evaluate production.

1.  Officer Prospecting Applicant Log.  The applicant log is a tracking system for applicants who were interviewed and is essential in assisting recruiters get "face to face" with qualified prospects in order to expedite the recruiting process. Applicant logs will also be used as an analysis tool by the OACR to determine individual recruiter/NRS strengths and weaknesses. The prospects annotated on the applicant logs require weekly follow up from the OACR.  The applicant log will be generated by the OR and used by the OACR/NRS Commander during the production review to ensure ongoing and relevant activity is tracked.  All applicant logs should be reviewed and closed out on a monthly basis.  In addition to the current month's log, those for the previous 12 months will be retained and available for review if needed.  The following interview source codes shall be used on the applicant log:

a. PH-Phone

b. RL/RN-Local or National Lead

c. RD-Collegiate Referral

d. RA-Applicant Referral

e. RI-COI/Counselor Referral

f. RS-Referral other service

g. PD-Personally Developed Contact

h. RP-Presentation/HARP/Seminar

i. WI-Walk In

j. RE-Enlisted Recruiter Referral

k. EM-Email

l. Facebook

2. <u>OPATE</u>. The OPATE shall be used to analyze recruiter prospecting and sales performance. Each recruiter/NRS Commander shall maintain an OPATE based on a 12 month rolling period. Complete the OPATE using data collected from the applicant log. The OPATE will be updated on a monthly basis as the recruiter's applicant log is closed out. The OPATE will be retained and immediately accessible for the current and previous 24 months.

3. <u>Recruiter Weekly Production Planner</u>. The Weekly Planner (Exhibit 050202) will be used by officer recruiting personnel to plan and coordinate daily/weekly/monthly activity. Each OR will maintain a weekly planner utilizing the planner from Exhibit 050202, **or a planner approved by the NRD chain of command** (if utilizing Microsoft's 2007 Outlook Planner, guidelines can be found at the end of this section for implementation and use). Each scheduled prospecting evolution will reflect planned activity and actual attained activity. OR planners shall be used in accordance with the NRD Officer Program MOP. Retain the current and previous 12 months of the weekly production planner.

4. <u>OACR Monthly Planner and Itinerary</u>. Each OACR shall maintain a monthly planner to be published and distributed to each NRS and key NRD personnel. This planner should reflect

monthly plans for the OACR, to include NRS visits and any training to be conducted.  Retain the current and previous 12 months of the monthly planner.  The R-OPS/Chief Recruiter (CR) shall review the OACR monthly planner.

050103.  **REPORTS**

1.  The following report shall be used by the R-OPS/OACR:

    a. NRS Quarterly Visit Checklist (Exhibit 050203).  This checklist will be utilized by the R-OPS/OACR to provide training and improve production.  Training and production related deficiencies identified during the visit will be annotated on a training syllabus and placed in the NRS Commanders training jacket along with a copy of the checklist.  During the Officer Production Review (OPR), the OACR will assess improvement of the OR weaknesses and/or correction of discrepancies and schedule follow up training or visits as necessary.  The R-OPS will maintain the original checklist for 36 months.

050104.  **GOAL ASSIGNMENTS AND APPOINTMENT.**  Based upon the R-OPS/OACR input, the NRD Commanding Officer (CO) will provide an Annual Officer Programs Goaling Letter (Exhibit 050201) to each OR.  The NRD CO, Executive Officer (XO), R-OPS, CR and OACR will review goal attainment progress with each NRS Commander/OR on a quarterly basis and both the NRD CO and OR will initial and date the bottom of the original letter for each quarter.  NRD changes made to the recruiter goaling letter will be via pen and ink, or via a written addendum to the letter.  Any change to the goaling letter must be approved / signed and dated by either the NRD CO or XO.

**Note**:  Market factors and historical trends have demonstrated that proactive measures lead to mission success.  Prospects should be identified within the first three quarters of the fiscal year with greater emphasis placed on the first two quarters.

**Implementation Guidelines for utilizing Microsoft 2007 Outlook
Planner**

**Purpose:**  To provide guidance for the implementation and
documentation of the OR planner using Outlook computer software.

1.  The OR's Planner is the primary method for planning and
executing daily activities.

    a.  Each OR will maintain a planner via Outlook.  This
planner is prepared on a continuing basis and its entries are in
perpetual change.

    b.  The NRS Commanders shall review/adjust the planner on a
daily basis and weekly during the OPR.  The planner can be
viewed in a variety of ways, laptop, printed copy or on
internet.

2.  Required planner documentation at a minimum, will consist of
the following:

    a.  Prospecting

    b.  Processing

    c.  Training

    d.  Conferences

    e.  Campus visits

    f.  Presentations

    g.  DEP meetings

    h.  Zone trainings

    i.  Hospital visits

    j.  NOSC visits

    k.  Other activity deemed necessary to achieve assigned goal

3.  Planners and category tables shall be printed on a weekly
basis and maintained for inspection purposes.

4.  ORs will provide to the NRS Commanders a printed copy of their planner on Friday showing all scheduled activity for the upcoming week.  NRS Commanders will also review the next 30 days of scheduled events to ensure adequate preparation has been provided.  (This includes diversity events, job fairs, luncheons etc.)

    a.  This will allow the NRS Commanders to monitor activity and help the OR work their prospecting plan.

5.  **NRS Commanders will assign prospecting expectations.**  The following expectations must be documented on the planner:

    a.  Expectations can be assigned daily or weekly.

    b.  Monitor activity and adjust as needed.

    c.  Adjusted prospecting will be documented on the planner.

## INTRODUCTION TO CALENDAR SHARING

1.  You can share calendar information with other people by using Microsoft Office Outlook 2007 in many ways.  In calendar, in the Navigation pane, there are several links to help you get started quickly with calendar sharing.  This article describes the ways to share calendar information by using the links in the Calendar Navigation Pane.  The links that you see will vary, depending on the accounts that are configured in your Outlook profile.

    a.  <u>Open a Shared Calendar</u>

        (1) When you use an Exchange account, you can open another person's default Exchange Calendar if the person has granted you permission to do so.

        (2) If the other person whose Calendar you want to open has not granted you permission to view it, Outlook prompts you to ask the person for the permission you need.  If you click "yes", a sharing request e-mail message opens automatically.  The message requests the person to share his or her Calendar with you and also provides the option to share your default Calendar with him or her.

        (3) After you access a shared Calendar for the first time, the Calendar is added to the Navigation Pane.  The next time you want to view the shared Calendar, you can click it in the Navigation Pane.

    b.  <u>Search Calendars Online</u>.  You can search Microsoft Office Online for Internet Calendars that you can view and subscribe to in Office Outlook 2007.

    c.  <u>Share My Calendar</u>

        (1) When you use an Exchange account, you can share your default Exchange Calendar with someone.  This person receives an e-mail notification that you have shared your Calendar.  You can also request that the recipient share his/her Exchange Celendar with you.

**Note**:  If you want to share a calendar that you created that is not your default calendar, in the Navigation Pane, right-click the calendar name, and then click "Share calendar name".

d.  Send a Calendar via E-mail

(1)  You can send any of the calendars you own to another person in an e-mail message.  This is a type of Internet Calendar called a Calendar Snapshot.  The calendar appears within the body of an e-mail message.  However, an Office Outlook 2007 user who receives the Calendar Snapshot can choose to open the calendar as an Outlook calendar.  Doing so can display the calendar Snapshot and the current calendar in side-by-side mode or calendar overlay mode.

(2) Recipients of Calendar Snapshots do not receive the changes that you make to your calendar unless you send them a new Calendar Snapshot.

(3) For calendars that recipients can subscribe to and keep up-to-date with changes that you make, consider using internet calendar publishing.  For more information, see the next section, Publish My Calendar.

e.  Publish My Calendar.  You can publish your default Office Outlook 2007 Calendar to Office Online and control who can access your calendar on Office Online.  Calendars published to Office Online are searchable, which helps other Office Online users find calendars of interest.  Publishing an Internet Calendar requires neither the publisher nor the user to use an Exchange account.

**Note:**  If you have access to a Web server that supports the World Wide Web Distributed Authoring and Versioning (WebDAV) protocol, you can choose to publish calendars to that server instead.  However, publishing to Office Online provides improved control over who can access your calendar.

f.  Add a New Group.  By default, in the Navigation Pane, Office Outlook 2007 organizes your calendars into three groups: My Calendars, People's Calendars, and Other Calendars.  You can rename these groups or create additional calendar groups to organize the calendars in a way that fits your work style better.

**Note:**  If you experience problems with the above listed guidance on how to utilize your Outlook calendars, contact your local System Administrator for assistance.

## EXPECTATIONS

1.  Outlined below is the required documentation for expectations setting.  Results of prospecting activity are tracked on the table views via outlook.

    a.  When expectations are established between the NRS Commander and the OR, the OR will ensure all specific goals will be documented on the planner.

    b.  The NRS Commander will make adjustments to the planner without adjusting the original goals.  The NRS Commander makes adjustment on the prospecting activity.

    c.  Adjusted prospecting will be documented on the planner.

**SECTION 2**

**OFFICER PRODUCTION ANALYSIS AND TRAINING for EVALUATION WORKSHEET (OPATE)**

**050201.   SECTION I – PROSPECTING/PROCESSING GENERATED**

1.   This section is the 12 month rolling historical prospecting/processing data indicating specific recruiting activity.  The following blocks will indicate specific activity and will come directly from the OR planner and applicant log.  This information shall be used to analyze recruiter prospecting and sales performance:

     a.   CON.  Contact:  Person recruiter has spoken with who appears interested and qualified.

     b.   PRS.  Prospect:  Person who has started the application process (taken test or returned paperwork, transcripts, etc.).

     c.   APL.  Applicant:  Application has been submitted to NAVCRUITCOM and is awaiting board results.

     d.   ORD PRO.  Application sent to board and gives a date when application was sent to board.

     e.   PRO REC.  Professionally recommended by board.

     f.   PHYSICAL.  Total number of physicals administered by MEPS/MTF.

     g.   Final Select.  Final result from Navy Recruiting Command.

     h.   ATT. (Attained):  Applicant has sworn/commissioned into U.S. Navy.

2.   All OPATEs shall be updated quarterly and reviewed by the Commanding Officer during the quarterly progress report.

**EXHIBIT 050201.   ANNUAL OFFICER PROGRAMS GOALING LETTER**

Date _____
(NLT 1 OCT of current year)

From:  Commanding Officer, Navy Recruiting District _____
To:    _____
          (Officer Recruiter)

Subj:  OFFICER RECRUITING REQUIREMENTS FOR FY____

1.  The following accession goals are determined to be your contribution to NRD _____ Officer Program's production for FY ____.  (If actual goals are not available, utilize anticipated goals based on previous goals and estimated program changes).

| Program | 1st QTR Goal/Attn | 2nd QTR Goal/Attn | 3rd QTR Goal/Attn | 4th QTR Goal/Attn | TOTAL Goal/Attn |
|---|---|---|---|---|---|
| _____ | ____ ____ | ____ ____ | ____ ____ | ____ ____ | ____ ____ |
| _____ | ____ ____ | ____ ____ | ____ ____ | ____ ____ | ____ ____ |
| _____ | ____ ____ | ____ ____ | ____ ____ | ____ ____ | ____ ____ |
| _____ | ____ ____ | ____ ____ | ____ ____ | ____ ____ | ____ ____ |
| Total | ____ ____ | ____ ____ | ____ ____ | ____ ____ | ____ ____ |

2.  I will personally review your progress quarterly.  The Recruiting Operations Officer (R-OPS) will review your progress weekly during the Officer Recruiter Production Review. Additionally, prospecting emphasis will be discussed during each production review.

3.  In order to ensure success, you must inform me, through the R-OPS, of any problems you encounter or foresee in obtaining your accession goals.


_____
Commanding Officer

**EXHIBIT 050201.   (P. 2) ANNUAL OFFICER PROGRAMS GOALING LETTER**

Reviewed:  (Initials & Date)

CO    _____/_____     _____/_____     _____/_____     _____/_____
        1$^{st}$ QTR          2$^{nd}$ QTR          3$^{rd}$ QTR          4$^{th}$ QTR

XO    _____/_____     _____/_____     _____/_____     _____/_____
        1$^{st}$ QTR          2$^{nd}$ QTR          3$^{rd}$ QTR          4$^{th}$ QTR

R-OPS _____/_____     _____/_____     _____/_____     _____/_____
        1$^{st}$ QTR          2$^{nd}$ QTR          3$^{rd}$ QTR          4$^{th}$ QTR

OR    _____/_____     _____/_____     _____/_____     _____/_____
        1$^{st}$ QTR          2$^{nd}$ QTR          3$^{rd}$ QTR          4$^{th}$ QTR


Distribution:
OR Training Jacket/R-OPS

**EXHIBIT 050202.   OFFICER RECUITER WEEKLY PRODUCTION PLANNER**

| RECRUITER  WEEKLY PRODUCTION PLANNER | | | | | |
|---|---|---|---|---|---|
| **MONDAY** | **TUESDAY** | **WEDNESDAY** | **THURDAY** | **FRIDAY** | **SATURDAY** |
| 0900 - 1200 | 0900 - 1200 | 0900 - 1200 | 0900 - 1200 | 0900 - 1200 | 0900 - 1200 |
|  |  |  |  |  |  |
| 1200 - 1500 | 1200 - 1500 | 1200 - 1500 | 1200 - 1500 | 1200 - 1500 | 1200 - 1500 |
|  |  |  |  |  |  |
| 1500 - 1800 | 1500 - 1800 | 1500 - 1800 | 1500 - 1800 | 1500 - 1800 | 1500 - 1800 |
|  |  |  |  |  |  |

**EXHIBIT 050203**

## NAVY RECRUITING STATION (NRS)
## QUARTERLY STATION VISIT CHECKLIST

NRS: _____

Date of Station Visit: _____

NRS COMMANDER_____ PQS Qualified?  Y/N     PRD:_____

# RECRUITERS __   PRD's:  REC #1____   REC #2 ____   REC #3 ____

# PQS Qualified _____

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### NRS APPEARANCE

1.   Does the office have a clean and professional
appearance?                                                   Y/N

2.   Are government vehicles clean (interior/exterior)?      Y/N

3.   Are recruiters' appearances within military standards?  Y/N

4.   Is physical fitness scheduled and executed (documented on
planner)?                                                     Y/N

5.   Is Station/Recruiter contact information prominently
displayed?                                                    Y/N

### SMART SYSTEM

1.   Is the OSMART board up to date (OMR, New Accession Overlay,
Goaling Letters, etc)?                                        Y/N

2.   Review and initial Campus Data Notebook.                Y/N

3.   Review and initial Area Visit Notebook.                 Y/N

4.   Is Collegiate Status Board up to date?                  Y/N

5.   Are After Action Reports for Diversity Events filed in
a timely manner?                                             Y/N

6.   Are areas of propensity identified?                     Y/N
(Officer Production Data)

---

7.  Review & analyze Quarterly/Annual Goals from Goaling Letter and document in writing high point areas and shortfalls.   Y/N

8.  Is recruiter territory breakdown shift updated and posted on the Smart Board?                                          Y/N

Comments:

_____

_____


**ORPMS/OTOOLS**

1.  Review OPATE Sheet for strengths/weaknesses.              Y/N

2.  Total # of prospects on applicant log.  Screen a minimum of three prospects during visit.                                Y/N

    a.  Total # of yearly prospects:  ____

    b.  Review Next Actions in OTOOLS of all prospects.      Y/N

3.  Are professionally recommended applicants being processed in a timely manner (less than 30 days)?                        Y/N

    Total Overdue:

    a.  Physicals _____

    b.  JPAS _____

    c.  Waivers _____

4.  Is pre prospecting (college visits, career fairs, NOSC visits, etc) being conducted and documented on planner IAW CRUITMAN instruction?                                       Y/N

5.  Are Career Fairs, COI events, Lectures, etc., planned and executed properly?                                            Y/N

6.  Observe one Officer Production Review during NRS visit.                                                           S/U

7.  Review and document training using last and current month's OPATE.                                                         Y/N

8.  Does each recruiter have an annual goaling letter signed by the CO?                                                    Y/N

9.  Does the recruiter possess a strong working knowledge of OTOOLS/RTOOLS?                                               Y/N


COMMENTS ON ORPMS/OTOOLS:
_____
_____
_____
_____


**TRAINING**

1.  Is there evidence of regular monthly station visits by the NRS Commander?                                              Y/N

2.  Is there evidence of recruiter PQS training and are they on schedule?                                                  Y/N

3.  Is formal GMT planned, conducted, and documented?      Y/N

4.  Is OJT and follow up training being performed and documented?                                                          Y/N

5.  Is individual training geared toward specific strengths and weaknesses?                                                Y/N

6.  Have the medical recruiters completed MEDCRUIT II?     Y/N

7.  Have all recruiters completed a graded PSS LAB monthly? Y/N

8.  Have all recruiters completed PSC/PSA?                 Y/N

**Comments:**
_____
_____
_____
_____
_____

## **COLLEGIATE MANAGEMENT**

1.  # of Collegiates year-to-date?  _____

2.  Does RTools reflect updated information pertaining to contacts, prospects, applicant status and collegiates?      Y/N (Review at a minimum 10 RTools records while in NRS)

3.  Are collegiate management programs utilized?
(PRIMS, PRT, Urinalysis)                                    Y/N

4.  Are all residuals and collegiate contract reports retained for 2 years of data?                                    Y/N

5.  Comments:
_____
_____
_____
_____
_____
_____
_____

### LEADS

1.  Is OTools/RTools effectively utilized to document the management of all assigned Leads?                                Y/N

2.  Number of overdue:

     a.  LEADS _____

     b.  OTools/RTools ___

     c.  NALTS__

     d.  Was training conducted?                                Y/N

     e.  Was training documented?                                Y/N

3.  Number of unassigned leads ____

     a.  Was training conducted?                                Y/N

     b.  Was training documented?                                Y/N

4.  Are all Recruiter leads contacted within 72 hours?        Y/N

**ALL DISCREPANCIES WILL BE TRAINED TO AND DOCUMENTED ON A TRAINING SYLLABUS ALONG WITH A FOLLOW-UP PLAN.**

**DATE:** _____

NRS **COMMANDER:** _____

**TRAINER:** _____

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SECTION 3

OFFICER PRODUCTION REVIEWS

**050301**.  **GENERAL.**  The Officer Production Review (OPR) is the single most important weekly interaction between the OACR/NRS commander and OR.  It is designed to diagnose, plan and expedite improvements to sales skills, prospecting and processing procedures.  Proper production reviews provide time to correct prospecting and processing short falls and identifies specific training needs.  All OPRs should be scheduled in advance with each recruiter.

**050302**.  **WEEKLY PRODUCTION REVIEW (PR) FROM NRS COMMANDER TO RECRUITER**.  As each new recruiter checks into the NRS, the NRS Commander must train the OR on how to prepare for the OPR.

1.  The formal OPR shall be held a minimum of once per week.  The OPR should be conducted in an environment free of distractions and limited interruptions to ensure that the OR is given the attention to ensure success.  The more prepared the NRS Commander is during the OPR, the more efficient the OR will perform.

2.  Prospect follow ups shall be done in a timely manner; training deficiencies shall not become production problems.

3.  **The NRS Commander shall continually check on the OR's progress throughout the day, as needed, to ensure the plan is being accomplished as approved, and that the desired results are being achieved**.

4.  In addition to conducting a formal production review, the NRS Commander shall review the following items:

   a.  Review new contacts/prospects that were held since last OPR and ensure all entries are correct.  Determine if the NRS Commander needs to do any follow up with contacts/prospects.

   b.  The OR's applicant log for any new contacts or prospects.

   c.  Status of contacts/prospects/applicants moving to the next step in the process (Scroll, JPAS, PRT, Medical, etc.).

d.   Number of contacts to date;  Are there sufficient contacts/prospects to meet OR's goaling letter requirements? The NRS Commander needs to be aware of this before going any further.

e.   The planner to ensure contacts/prospects are being logged.  Ensure all known activity and new commitments are logged on the planner.  Ensure that all prospecting activity is goaled and that the attained activity is logged on the planner as well.

f.   MEPS processing schedule; Are prospects/applicants scheduled for a MEPs physical/contract physical in a timely manner?

g.   Review Campus Data Notebook to ensure effective school visits are being conducted and COIs are being developed.

h.   Review Area Visit Notebook to ensure that effective area canvassing is being conducted and COIs are being developed.

i.   Review LEADS to ensure they are actively being worked. Ensure proper disposition of LEADS IAW CRUITMAN Article 010706.

j.   Based on goal remaining, use OPATE to determine the plan for the upcoming month and strengths in prospecting.

k.   Consider processing delays and consider corrective actions.

l.   Update planner and MOP as appropriate.

**050303**.  **OACR TO NRS COMMANDER**.  The purpose of the OACR weekly production review is to determine whether the NRS is following the prospecting plan and is on track to attain all assigned goals (as per each recruiter's goaling letter and MOP).  To assist the NRS in attaining all assigned missions, the OACR must determine the following:

1.  Status of all Eligible Contacts/Prospects.  Review the status of contacts/prospects and determine if steps were taken to identify individual NRS weaknesses and to make adjustments for prospecting/processing shortfalls.  For example, has prospect been scrolled?  What is the status of JPAS and physical qualification for those individuals that have been professionally recommended by the board?

2.  <u>Prospecting Results</u>.  Are the recruiters being directed into the right target market and is the market being penetrated?  From what prospecting modes are contacts/prospects being attained?  Review results of the prospecting plan for each NRS and identify areas to have the NRS Commander follow up with executive screening (PRO REC Y that are not being attained, LEADS, etc).

3.  <u>Entire Command's Performance</u>.  The OACR and the NRS Commander should be constantly reviewing the performance of each individual recruiter to ensure that the command's expectations are met.  If not, the chain of command must analyze and determine the cause of each person's shortfalls.  Consider long-range performance to determining manning discrepancies and NRS trends.

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**SECTION 4**

**OFFICER STATION MARKET ANALYSIS AND REVIEW TECHNIQUE**

**050401.** **GENERAL.** The Officer Station Market Analysis and Review Technique (OSMART) system was designed to target quality market centers.  It shows where recruiting resources should be focused to achieve the best possible results.  Recruiters can compare and analyze strengths and weaknesses in their area of responsibility so new strategies and training methods may be applied.  The data produced by WEBSTEAM provides the majority of the information needed for the OSMART system.  A view of a NRS OSMART territory map will be available in the near future.  To view some of the information available in WEBSTEAM, go to the NRC quarterdeck (**https://rq.cnrc.navy.mil/**), click on Applications, WEBSTEAM, and then select certificate or enter user name and password.  On the homepage select the NRD, and then from the NRD page, select the layer control icon from the top control icons.  Select any of the options that will help you identify your total available market.  If you choose to make visible the Navy Recruiting Stations (NRS), place a check mark and then select "add layer".  All NRS's within your NRD will appear upon the NRD map.  If you select the layer control icon and make visible all Navy Recruiting Stations, then all NRS's will appear on the NRD map.

1.  NRS Territorial Map.  A map of the NRS area of responsibility (AOR) must be large enough to post the entire territory in detail.  A NRS with both rural and metropolitan areas may require a district map with metropolitan inserts to adequately represent the AOR.  The geographic subdivisions used shall be large enough to permit meaningful analysis and obtain reliable market data.  In time, the information contained in WEBSTEAM will continue to improve the historical and current market analysis ability for the officer recruiting mission.  Obtain a map of the NRS for the OSMART Board and outline the individual recruiter AOR and NRS boundary in map tape or marker.  Indicate the following locations:

    a.  Red Star-NRS.  If a NRS has a Part-Time Office (PTO), print a "P" on top of or next to the Red Star that locates the PTO.  A part-time office is a subordinate office that may be manned on specific days or may operate with a permanently assigned recruiter who reports to an Officer in Charge (OIC) of a main NRS.  A PTO must be in the boundary of the NRS.

    b.  Blue Star – Residency or medical teaching Hospital for

resident medical programs.  If the residency program is considered a current Critical Wartime Specialty, print a CWS on top of or next to the blue star.

       (1) Green Star - Two-year college.

       (2) Gold Star - Four-year college.  Place an "N" in the middle to denote NROTC affiliation.

       (3) Silver Star – Navy Operational Support Centers (NOSC).

       (4) Use a 3 x 5 inch card affixed to the NRS territorial map to explain coding.

    c.  <u>New Accession Overlay</u>.  The New Accession Overlay is used to record the location and the quality of actual accessions.  The overlay will also be used in the future to record officer accessions of other services once made available through the Defense Manpower Data Center (DMDC).  The new accession overlay will be updated daily and shall be retained for two years.  Use clear acetate for the overlay.  The following legend will be used:

       (1) Full Circle Yellow Dot – Active Programs OCS/ODS Accession (except Medical).

       (2) Full Circle Blue Dot – Navy Reserve GENOFF Accession.

       (3) Full Circle Red Dot - Active Medical Accession.

       (4) Full Circle Green Dot- Navy Reserve Medical Accession.

       (5) Place the corresponding Full Circle Dot on the overlay according to geographic location of the accessions residence or college/university attending.  Identify diversity by printing either a "B" for Black, "H" for Hispanic, or "A" for Asian Pacific Islander on the colored dot.

2.  <u>Goaling Letters/Monthly Gate Sheet</u>.  The Goaling Letter is to be used at the recruiter level.  The recruiter's current and previous two years goaling letter shall be retained on file. The Recruiting Operations Officer (R-OPS)shall maintain a current copy of the Departmental Gate Sheet and retain the previous two years on file.  The Recruiter Goaling Letter

spreadsheets are excellent tools for tracking performance.  The Monthly Gate Sheet is an excellent tool to provide a fiscal year to date summary of the departmental and NRD performance.  This data will provide the R-OPS with a quick reference for where emphasis must be placed for the department to get on track to meet fiscal year goals.  All spreadsheets will be maintained and used in conjunction with the monthly goaling letter/notice.

3.  Collegiate Status Board.  The collegiate status board is used to maintain a twelve-month rolling picture of the collegiate pool.  The collegiate status board will be set up with vertical columns, depicting the following information: Their name, college, accession date, date entered PRIMS, date of last urinalysis, date of last physical, date of last PFA, Oct – Sept. columns.  Each month, it is required to record at least two collegiate contacts either electronically, telephonically, or face-to-face.  A minimum of one face-to-face contact will be made every two months.  Enter the type of contacts that were made each month for every collegiate in the collegiate pool. The collegiate status board will be placed in a prominent location visible to both applicants and collegiate members. Information must be current and correct.

    a.  TOTAL COLLEGIATES:  Total number of individuals in the collegiate pool.  Place the total number of collegiates at the top of the collegiate status board.  This number should match your total number of collegiates in OTools.

4.  School Canvassing Program.  The school-canvassing program will include medical schools, nursing schools, teaching hospitals, colleges, universities, law schools, seminaries and other post secondary institutions.  For the purpose of this manual the word "school" refers to colleges, universities, teaching hospitals, and any other institutes of higher learning associated with Navy Officer recruiting.  The school canvassing program described is general in nature, but contains specific requirements to be adopted within any canvassing plan.  It does not impose limits or boundaries on the initiative or imagination of the individual recruiter.  Good school canvassing programs will use available recruiter resources to effectively recruit to, penetrate, and/or develop viable markets.

    a.  General Program Guidance.  Quality schools are prime sources of prospects.  Each NRD will have a comprehensive school-canvassing program with established priorities and milestones.  The program will consist of recruiting activities planned throughout the year in coordination with the MOP.  The

program will be reviewed and modified to fit the recruiter, school and community needs.

b. <u>Analysis of School Market</u>. The OR and OACR will analyze each school in the NRD's territory and direct efforts accordingly. The annual Officer Market Report (OMR) provided by COMNAVCRUITCOM (N511) that shows identifiable historical officer accession production from universities and colleges and relevant markets will be reviewed by each NRD R-OPS and retained for two years. The following factors will be considered in analyzing the school market:

(1) What schools are actually producing applicants?

(2) What schools have the quality student that the Navy needs?

(3) What schools will actively promote the Navy and distribute Navy material?

(4) What schools have non-cooperative positions toward the military and/or the Navy? Seek out COIs to assist in understanding the concerns and improving the relationship.

(5) What schools are historically non-productive and why?

c. <u>School Priority Ratings and Management</u>. The schools will be divided into three priority ratings based on market and will be visited as follows:

(1) Priority 1. At a minimum, must include all dental, medical, engineering and historically top producing schools based on the OMR report. These schools will be visited once a month at minimum. Priority 1 schools will have an OR designated as the Campus Manager to coordinate cross program events to obtain maximum benefit. Waivers to the minimum monthly requirement must be approved by the NRD CO or XO in writing based upon NRD, NAVCRUITREG and NAVCRUITCOM goal attainment.

(2) Priority 2. Possess marketable prospects, but have been historically poor producers. These schools will be visited quarterly at a minimum. All visits are done with the intent to develop the school into a Priority 1 market.

(3) Priority 3. Possess limited marketable prospects and/or demonstrate non-supportive position toward the military.

These schools will be visited annually at a minimum, preferably at the start of a term/semester.  Visits will be performed to foster COI cultivation and improve relations.

    d.  <u>Making the Initial Appointment</u>.  All initial visits by either new recruiters or to new schools will be made by appointment.  All school visits will be tracked in the Campus Data Notebook.  Do not utilize "dropping by" techniques when first establishing your campus presence as you may interrupt an established schedule.  If an OR is unable to keep an appointment, the OR will notify the school representative prior to the time of the appointment to cancel or reschedule the appointment and notify the NRS Commander of the change in schedule.

    e.  <u>The Appointment</u>.  Recruiters are to be on time and project the proper Navy image at all times.  Attitudes are usually formed on the first face-to-face contact, and past negative impressions must be overcome during this meeting.  Key points to be taken into account that will aid in your success are:

        (1) How much of the school official's time can the recruiter take and how much time does the recruiter have to spend at the school?

        (2) The recruiter will establish an outline of what he/she wants to accomplish.  The recruiter will take notes during the appointment.

        (3) The recruiter must convey that he/she is an asset/benefit, not a threat, to the students.  The officials must trust the recruiter before they will accept the recruiter.

        (4) The recruiter will have an outline of his/her goals for the conversation.  Some subjects that should be discussed are:

            (a) The importance of the students graduating and obtaining their degree prior to entering the Navy.

            (b) Benefits such as medical, training, housing, advancements and retirement.

            (c) Navy postgraduate education opportunities.

(d) The Educator Orientation Visit (EOV) Program, intended to educate the educators, is a good way to overcome objections and concerns.  Recruiters should talk to their Education Service Specialist for further details.

(e) Navy special events that are coming or planned, i.e., Blue Angels, Navy bands, exhibit vans, etc.

f.  <u>Closing the appointment</u>.  Every effort should be made to stay within the time allotted for the appointment.  Recruiters will express their appreciation for the individual's time and leave a business card.

g.  <u>Follow-up School Visit</u>.  Officer Recruiters will go with a predetermined purpose when conducting school visits.  Going into the school without a plan or purpose is unprofessional and unacceptable.  Recommended activities include:

(1) Inspect collateral material displays.  Recruiters will maintain display items on campus in an orderly and timely manner.

(2) Set up a place for interviewing that is agreeable to the school administration and students (e.g., placement office).

(3) Make arrangements to provide presentations to classes.

(4) With school administration approval, teach a class in your field of expertise, e.g. career planning, goal setting, rating/designator specific subjects, degree background.

(5) Attend major school functions.

(6) Deliver a copy of the school newspaper ad if the NRD has purchased space.

(7) Visit with collegiates while on campus.

(8) Visit placement and financial aid offices while on campus visits and inspect Navy contact information and any postings for accuracy.

(9) Visit local NAVCRUITSTA and get enlisted recruiters involved (where feasible).  A courtesy call should be made to the Work Center Supervisor (WCS) prior to such visits.

h.  College Career Fairs/Days, School Talks, and Events on NAVCRUITCOM's Diversity Calendar (located on the Recruiting Quarterdeck).  These events are conducted to promote career awareness.  Participation in these events is mandatory and may take the form of a short presentation or passing out collateral material.

(1) Prior to Presentation.  The preparation and planning phase is most important to a successful presentation/fair.  Outside sources can be used, such as Medical Recruiting Navy (NAVCRUITCOM funded)/Medical Speaker Bureau (BUMED funded), NTOs, etc.  When preparing for the presentation the following factors should be considered:

(2) Audience.  Determine composition and size:  gender specific, mixed gender, age groups, ethnicity, etc.  Select the topic that will be of interest to the recruiter's audience.  Determine the location and audience size to be accommodated.  Stay flexible for last minute changes.  If it is a career day booth make certain all participants know the details of the event.

(3) Use of Time.  Decide how to maximize the time allotted for the presentation.  Possibilities include, but are not limited to discussions, lectures, talks, slides or film presentations, etc.  Keep this in mind when planning.

(4) After the presentation.  Analyze and document the results of the presentation with After Action Report (AAR) and make notes on how to improve future presentations; Follow-up on any leads or unanswered questions.

i.  Campus Data Notebooks.  The Campus Data Notebooks are prime sources of market identification.  It is crucial that you maintain a positive and consistent working relationship with each college in your territory.  Campus Data Notebooks will be set up utilizing the same format as the NAVCRUIT 1133/37(SCHOOL FOLDER).  The colleges assigned to each recruiter will be broken down utilizing Exhibit 050401.  The following information will be in the Campus Data Notebook:

(1) Establish a Campus Data Notebook (CDN) for each priority 1, 2 and 3 colleges in your territory.  Priorities are assigned to working colleges/universities and are defined by the amount of effort and time planned in an institution relative to the effort planned in other schools.  The officer recruiter will spend more time and effort in schools listed as Priority 1 vice

those that are Priority 2 and 3.  The Campus Data Notebook will be clearly marked with the appropriate code.  The Priority designation shall be based on the following:

(a) The size of the population in the school or class population.

(b) Access to the school.

(c) Officer Marketing Report.  Report generated by NRC that shows identifiable historical officer accession production from universities and colleges and relevant markets.

(2) Section I:  Contact Data.

(a) Faculty information from the college/university to include all important points of contact with telephone numbers (Dean, Registrar office, VA Representative/Athletic Director/Professors, etc).

(b) The Active Duty and Individual Ready Reserve (IRR) Collegiate Roster and will include at a minimum the following information concerning each student:  name, address, phone number, final program and future graduation date.

(c) Selected Reserve (SELRES).  These rosters will include at a minimum the following information concerning the student: name, address, phone number, final program and future graduation date.

(3) Section II:  Quarterly Checklist/Post Prospecting Activity Report.

(a) Campus Data Notebook Checklist which will be a quarterly spot check utilized by the XO/R-OPS/OACR.

(b) Officer Recruiting Post Prospecting Activity Reports (NAVCRUIT 1131/25).  NAVCRUIT 1131/25 documents each campus visit/evolution, e.g., career days, major presentations, and college blitzes that required an IRD from the NRD to support the funding of any such event.  A report will be submitted at the completion of a prospecting activity, as well as any time a significant social, economic or political event occurs that could change the recruiting atmosphere.  The Post Prospecting Activity Report will be maintained in the Campus Data Notebook.

(4) Section III:  Additional Information.

(a) Area and campus map indicating where the college/university is located in that area of responsibility.

(b) College/University presentation roster to indicate what presentations were given by the recruiter and the date.

(c) Clubs and Associations Lists.

(d) Monthly school visit checklist.  Recruiter will document what was accomplished during the school visit.  Any significant events that occurred that will impact present and future recruiting in that school (e.g., any new COIs established, any new upcoming events established, any new prospects from presentations, etc.).  Planned activity for a College/University visit should be in conjunction with the Program Calendar for an individual recruiter.

(5) Each year the recruiter must prepare a new Campus Data Notebook for every working college/university assigned. The initial visit is crucial and its importance cannot be overemphasized.  This visit begins the long term relationship of the recruiter and the institution.

(6) Responsibilities:

(a) The R-OPS will:

1.  Maintain a list of all colleges within the commands prescribed territory.

2.  Assign each priority 1 and 2 school to a specific officer recruiter for a specific program market (e.g., Medical programs).  For schools with multiple officers assigned, such as a large State University, assign one OR as the Campus Manager.

j.  Area Visit Notebooks.  Area visit notebooks will be established for officer recruiters who recruit specifically to reserves.  The area visit notebook will consist of the following:

(1) Section I:  Contact Data.

(a) Target market centers located within the area of responsibility to include hospitals, NOSCs, reserve centers, chapels, etc.  Also include points of contact, addresses, and

phone numbers.

        (b) COI Roster.  The COI roster will include at a minimum the following information concerning each COI:  name, address, phone number, and how each COI is contributing to the process.

        (2) Section II:  Quarterly Checklist/Post Prospecting Activity Report.

        (a) Officer Recruiting Post Prospecting Activity Reports (NAVCRUIT 1131/25).  NAVCRUIT 1131/25 documents all major presentations, hospital visits, and NOSCs events that require an IRD from the NRD to support the funding of any such event.  A report will be submitted at the completion of a prospecting activity, as well as any time a significant social, economic or political event occurs that could change the recruiting atmosphere.  The Post Prospecting Activity Report will be maintained in the Area Visit Notebook.

        (b) Area Visit Notebook Checklist which will be a quarterly spot check utilized by the XO/R-OPS/OACR.

        (3) Section III:  Additional Information

        (a) Initial Pre-visit preparation list

        (b) Area maps

        (c) NRS Information (addresses and phone numbers of NRS's near the area or enroute).

    k.  Diversity Markets.  A Navy priority is to recruit a diverse collegiate and workforce market.  Often, a NRS or individual recruiters are assigned special programs and diversity targets.  In particular, considerable emphasis is placed on locating the diverse quality markets.  STEAM provides demographic data for African-American, Hispanic, and Asian, Pacific Islander/Native American populations by colleges.

    l.  Propensity.  Propensity is the inclination to join the military.  A NRD should take advantage of high propensity colleges and territories by assigning additional recruiters to NRS in those areas.  Many factors can contribute to higher propensity in a community, e.g, a large and active veteran community, a pro-navy college, proximity to a Navy or other service facility, etc.

**EXHIBIT 050401.** **RECRUITER TERRITORY BREAKDOWN**

**RECRUITER TERRITORY BREAKDOWN (WEBSTEAM DATA)**

**RECRUITER:** _____ **DATE:** _____

**COLLEGES ASSIGNED:**

      1)._____

      2)._____

      3)._____

      4)._____

      5)._____

      6)._____

      7)._____

      8)._____

      9)._____

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SECTION 5

MARKET ANALYSIS - RESERVE COMPONENT (TARGETING THE MARKET)

**050501. INTRODUCTION**. The Reserve mission is to make goal with the highest caliber accessions obtainable. Time is valuable, so recruiters must conduct an analysis of their assigned territory to identify where to recruit people with the least amount of effort. As the size and composition of the primary market changes, it becomes increasingly important that the recruiter employs an analytical approach to recruiting.

**050502. MARKETING ENVIRONMENT.** Recruiting is competitive. A recruiter must know how to effectively analyze the market and territory in order to focus their prospecting activity quickly as Navy Reserve programs change. Market and territory analysis provides the recruiter with an effective tool to attain assigned goals.

**050503. MARKETING DEFINITIONS**

1. Market analysis is a systematic way of determining the location, number and quality of work force potentially available in a geographic area.

2. Territory analysis is the demographic area to ascertain what actual help or information can be obtained from the territory to prospect smartly.

3. Analysis of Military Available (MA) will pinpoint sources of potential quality and quantity affiliates and is a prerequisite for success.

4. Potential Sources are any persons, organizations or territories that give referrals, or places where an affiliate might be located within the NAVCRUITSTA boundaries.

5. Production Analysis is a continuous recording and study of the number of accessions, including quality and their source.

**050504. TARGETING THE MARKET FOR EACH NAVY RESERVE PROGRAM**. The Navy Reserve currently has three basic "Target Markets" to consider:

1. Navy Veteran (NAVET)

2. Direct Commission Officer (DCO)

3.  Other Service Veteran (OSVETS)

**050505.  IDENTIFY MARKET AND INFORMATION SOURCE.**  Determining where the market is located requires mapping demographic data. Outline the entire territory and mark the locations of major market sources on the map:

1.  Two and four year colleges

2.  Medical Residency hospitals to include VAMC's

3.  Key information centers such as city/county/state government offices, chambers of commerce, Veteran Service Officer offices (each county has one)

4.  Medical and engineering colleges

**050506.  MARKET SOURCE POTENTIAL.**  The potential of a market source can be determined by considering the following areas:

1.  Quantity (numbers only) possible out of each source

2.  Quality (mental/physical/possible waivers, etc.) possible from source

3.  Accessibility of each source

4.  Past history of production from each source (production analysis)

**050507.  TERRITORY ANALYSIS.**  A territory analysis goes into greater detail about information available in a given area. Through territory analysis you may find for example, that developing an effective referral network is more effective than other prospecting methods in a given area.  Some of the following items may be helpful to consider and should be listed or identified on the territory map.

1.  Basic territory information

2.  Population centers

3.  Community events

4.  Economic conditions

5.  Culture, ethnic groups, or minorities

6.   Recruiting Advertising Materials (RAD) item locations

7.   Community activity centers

8.   Centers of Influence

9.   Major highways, interchanges and traffic patterns

10.  Newspapers and radio/TV stations that reach the market

11.  FLEET Concentration Area Recruiter

12.  Navy Operational Support Center (NOSC)

13.  Military organizations – American Legion, VFW, etc.

**050508.  MARKET ANALYSIS**

1.  Statistics.  One of the benefits of market analysis is confirmation by statistics.  A recruiter often has a feel for the territory; however, allocation of resources cannot be done based on feelings.  Market/Territory Analysis and production reviews help show where the prospect should be located and determine the most effective way to prospect.

2.  Know the territory.  As the recruiter works his/her territory of responsibility, he/she will learn who the Centers of Influence (COI's) are and where they are located.  The recruiter shall post names and date changes immediately for tracking purposes.  It is essential for the recruiter to review these records every few months and update them as necessary. The recruiter must save time, stay informed, make everyone a vital part of hometown recruiting, and realize the potential of each COI to help make the mission.

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